

NEXIA ASR PRIVACY STATEMENT

Introduction

Nexia ASR, Chartered Accountants, and its associated entities (Nexia ASR) is committed to protecting your privacy and your personal information and aims to maintain a high standard of compliance with the Privacy Act 1988 (Cth) (as amended by the Privacy Amendment (Private Sector) Act 2000).

This Privacy Statement forms part of the Nexia ASR Privacy Policy and is intended to inform you about the following:

- the manner in which Nexia ASR collects your personal information;
- the main purposes for which Nexia ASR uses that information;
- how you can access, correct or update any personal information that Nexia ASR holds about you; and
- how Nexia ASR keeps the information secure.

How does Nexia ASR collect personal information about me?

Most of the personal information about you is collected by Nexia ASR either directly from you or indirectly from your employer or professional advisers. The personal information is typically collected in connection with Nexia ASR's delivery of services to its clients.

What personal information does Nexia ASR collect about me?

Nexia ASR may collect any of (but not necessarily all of) the following information about you:

- gender, date of birth and next of kin and family details;
- contact details;
- employment details such as your salary, superannuation contributions and employment status;
- accounting and business records;
- Tax File Number and taxation records;
- statements of financial position regarding assets and liabilities;
- attitudes to investment risks; and
- any other information that is necessarily incidental to the services provided by Nexia ASR.

We may also need to ask you for other specific personal information to enable Nexia ASR to provide its services to you.

Why does Nexia ASR collect this information?

Nexia ASR collects this information to provide accounting, taxation, financial planning, superannuation fund establishment and administration, business advisory and other related services from time to time supplied by Nexia ASR.

How does Nexia ASR use the personal information held about me?

Any personal information about you that Nexia ASR collects and records will only be used or disclosed by Nexia ASR lawfully and by fair means for the purpose of:

- helping Nexia ASR efficiently and effectively deliver and improve on Nexia ASR' products and services or any other purpose specified to you at the time of collection; or
- any other purpose if you would reasonably expect Nexia ASR to use or disclose that personal information for that other purpose and that other purpose is related to the above purpose; or
- sending you news, and other information about Nexia ASR' activities and general promotional material which Nexia ASR believes may be of interest to you, however, when Nexia ASR does this, Nexia ASR will provide you with an express opportunity to decline receiving any further communication from Nexia ASR of this type via an opt-out mechanism.

If Nexia ASR wishes to use or disclose any of your personal information other than as set out above, Nexia ASR will not do so unless:

- Nexia ASR has your express consent to do so;
- Nexia ASR has reasonable grounds to believe that the use or disclosure is necessary to prevent a threat to life or health; or
- Nexia ASR has reasonable grounds to believe that the use or disclosure is required by law or to enforce the law.

What happens if I want to access or correct the personal information held about me?

You may access your personal information held by Nexia ASR, subject to some exceptions by making a request in writing to the Nexia ASR Privacy Officer. We will respond to your request for access as soon as practicable and endeavour to provide the requested information within 30 days.

We may charge you a reasonable fee to recover our costs for providing access based on the quantity of material and time involved in providing access.

We may not be able to provide access to information in some situations including:

- where providing you access will pose a serious threat to the life or health of any individual or will pose an unreasonable impact on the privacy of any individual;
- where your request for access is frivolous or vexatious; or

- where providing access would be unlawful, may prejudice an investigation of possible unlawful activity, may prejudice enforcement of law, or denying access is specifically authorised by law.

If Nexia ASR does not allow you to access your personal information, Nexia ASR will provide you with written reasons for its decision.

Does Nexia ASR provide my personal information to third parties?

There are some instances when we need to provide your personal information to third parties. Sometimes we need to outsource some of our administrative and related functions to external organisations or we may need to seek assistance from external organisations such as insurers, underwriters, investment managers, banks and other financial institutions, lawyers, auditors and other advisors. We may also provide your information to government authorities such as the Australian Taxation Office. Most of the above organisations are bound by confidentiality obligations to Nexia ASR.

Nexia ASR does not sell your personal details to other organisations. We may however use the information about you to assist us with internal marketing and research.

How does Nexia ASR keep my personal information secure?

Nexia ASR will take reasonable steps to ensure that all information Nexia ASR collects, uses or discloses is stored in a secure environment that is accessed only by persons authorised by Nexia ASR so as to prevent misuse, loss or unauthorised access, modification or disclosure.

If the personal information is no longer needed for any purpose, Nexia ASR will take reasonable steps to destroy or permanently de-identify the personal information.

Nexia ASR endeavours to provide a secure environment and a reliable system but you should be aware that there are inherent risks associated with the electronic storage and transmission of information (particularly via the Internet) which cannot be guaranteed to be 100% secure.

Who do I contact for further information?

Our Privacy Officer can assist you with any enquiries you have about the information that we hold about you. He can be contacted on **9608 0100** from **9.00am to 5.30pm** (Melbourne time), Monday to Friday.

You can also write to the Privacy Officer – Nexia ASR at:

Privacy Officer
Nexia ASR
Chartered Accountants
Level 14
440 Collins Street
Melbourne VIC 3000

Facsimile 9670 8325

What if I have a complaint or concern?

If you have a complaint or concern you can phone the Nexia ASR Privacy Officer on 03- 9608 0100 or write to the Privacy Officer at the address above. We will do our best to try and resolve your complaint within 90 days.

If we are unable to resolve your complaint within this time, or you are unhappy with the outcome, you may refer your complaint to the Privacy Commissioner in your State capital. The Privacy Commissioner can be contacted on 1300 363 992 or at the following address:

Piccadilly Tower
Level 8
133 Castlereagh Street
Sydney NSW 2000

Thank you for taking the time to read the Nexia ASR Privacy Statement.

Nexia ASR

**Chartered Accountants
Level 14
440 Collins Street
Melbourne VIC 3000**

**Telephone 9608 0100
Facsimile 9670 8325**

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